

EPA

Telework Training for Supervisors

Instructor Guide



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Instructor Tips

People learn more from hands-on experience than they do from listening to information. Therefore, as the facilitator, your role will be to guide the participants through a process of self-learning. The following tips have been provided to assist you in preparing for your session.

Preliminaries

1. Prepare in advance. Make sure you are familiar with the material to be presented.
2. Consider the needs, expectations and experience of your audience.
3. Make sure all materials are in the class and that all equipment is working properly.

Key Responsibilities

1. Create an interactive participatory environment – involve the group in discussions.
2. Keep the group on track and moving forward.
3. Remain open, objective and flexible.
4. Establish the benefits of the course early in the session.

Group Discussion Tips

1. Ask open ended questions.
2. Demonstrate active listening skills.
3. Allow for silence. People need time to process what has been said and to put their own thoughts in order.
4. Invite group participation – encourage students to be involved with questions and answers.
5. Refocus the group if discussion gets off track.

Materials Required

- Instructor Guide
- Learning Journals (one for each participant)
- Discussion Scenarios (one set for maximum of 4 groups (if you will have more than 4 groups, print an extra copy))
- Computer or similar with presentation screen
- EPA Telework Training for Supervisors PowerPoint presentation
- Flip Chart or Large Post-It with markers
- Pen/Pencil (for participants)
- Timekeeper (for instructor)

Course Overview

Course Name

EPA Telework Training for Supervisors

Duration

Four (4) hours

Target Audience

EPA Supervisors and Managers

Purpose

This training will provide an overview of the new EPA Telework policy and suggestions on how to manage teleworkers.

Course Objectives

Participants who actively participate in this course will be able to:

- Define Telework
- Recognize the benefits and challenges of telework and becoming a virtual leader
- Determine telework agreements
- Establish and manage accountability
- Establish communication protocols
- Establish standards for providing feedback and updates on work products and projects
- Develop work plans and tasks
- Determine telework collaboration and remote access tools

Course Agenda

Section	Length of Time
Introduction	15 minutes
<i>Activity: Benefits and Challenges of Teleworking</i>	20 minutes
Policy Overview	30 minutes
Technology Tools for a Virtual Office	15 minutes
How to Manage Teleworkers	30 minutes
<i>Activity: Debrief</i>	10 minutes
Break	15 minutes
<i>Activity: Convert Your Processes</i>	20 minutes
When Should Telework be Approved?	30 minutes
<i>Activity: Discussion Scenarios</i>	35 minutes
<i>Activity: Debrief</i>	10 minutes
Closing	10 minutes
Total Training Time	240 minutes

Opening

SHOW: Slide 1

TIME: Have open as everyone arrives

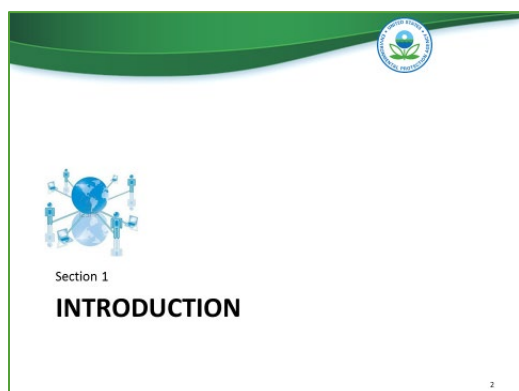


>> NEXT SLIDE

Section 1: Introduction (15 minutes)

SHOW: Slide 2

TIME: 1 minute



STATE:

Welcome to the Telework Training for Supervisors course. Our first section today is an introduction to the course.

>> NEXT SLIDE

SHOW: Slide 3

TIME: 2 minutes



STATE:

First, I'd like to introduce myself. My name is:

I'd also like to introduce some other visitors we have with us today.

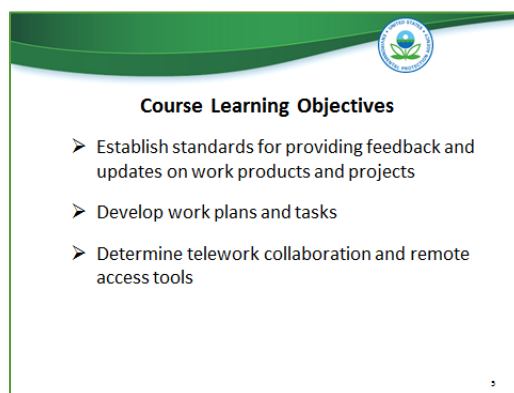
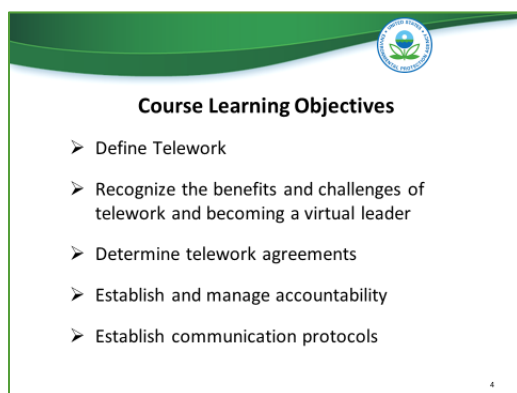
Introduce the Telework Coordinator, the LER, and/or their representatives.

The purpose of our training today is to provide you with an overview of the new EPA telework program and to provide you with some strategies and suggestions on how to manage teleworking in your office.

>> NEXT SLIDE

SHOW: Slides 4-5

TIME: 1 minute



STATE:

As a result of attending this course, you will gain the ability to discuss the new EPA telework program and will become knowledgeable of strategies to manage teleworkers and a virtual office.

Let us review the agenda for this course.

>> NEXT SLIDE

SHOW: Slide 6

TIME: 2 minutes



Section	Length of Time
Introduction	15 minutes
Activity: Benefits and Challenges of Teleworking	20 minutes
Policy Overview	30 minutes
Technology Tools for a Virtual Office	15 minutes
How to Manage Teleworkers	30 minutes
Activity: Debrief	10 minutes
Break	15 minutes
Activity: Convert Your Processes	20 minutes
When Should Telework be Approved?	30 minutes
Activity: Discussion Scenarios	35 minutes
Activity: Debrief	10 minutes
Closing	10 minutes
Total Training Time	240 minutes

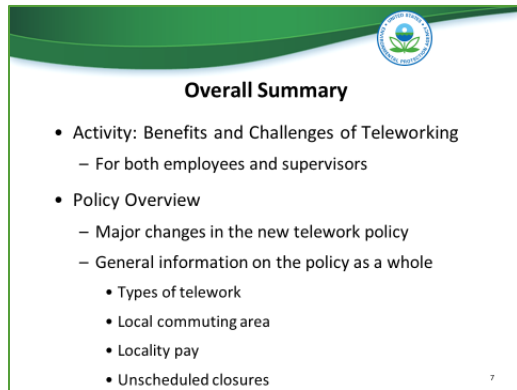
STATE:

As you can imagine, we are going to cover a lot of information today. Along with presenting a policy overview, we will touch on technology tools and ways to manage your teleworkers. We have some time set aside for Debriefs, to cover any questions you have not had answered during each section. You will also be completing some activities throughout the course. The next few slides provide more details on each section.

>> NEXT SLIDE

SHOW: Slide 7

TIME: 2 minutes



STATE:

First of all let's go over some specifics about the sections and major activities that we will be covering today. This way you will have an idea of when we will be covering the different topics you are hoping to see.

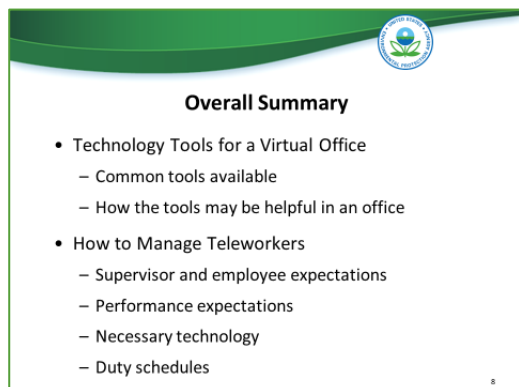
The first activity we will be completing is on the benefits and challenges of teleworking for both employees and supervisors.

Then we will begin our first section which is an overview of the policy. This section highlights major changes in the new telework policy, and provides **general** information on the policy as a whole. You can see here some of the topics. We delve into more specific areas as we move through the course.

>> NEXT SLIDE

SHOW: Slide 8

TIME: 2 minutes



STATE:

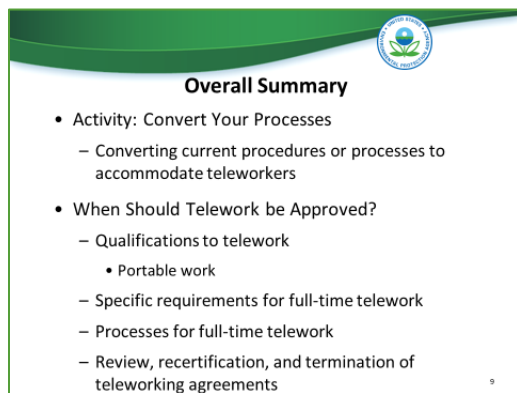
The second section is on technology tools. We will have a general introduction to various tools that are available for you and discuss any region specific tools you may have access to. You will have an opportunity here to record the tools you might use for various office procedures.

Then we will begin our section on how to manage teleworkers. This section goes into more detail on what you can and should expect from your employees, what you are expected to accomplish as a supervisor. We will be discussing necessary technology in and out of the office, what should happen when technology fails, and general information such as duty schedules.

>> NEXT SLIDE

SHOW: Slide 9

TIME: 2 minutes

**STATE:**

You will be participating in an activity to assist you in reviewing some processes or procedures in your office and then adjusting them to working with teleworkers.

And then our last major section will cover the approval process for teleworkers. We will cover the requirements for regular and full-time telework and take a look at the processes for review, recertification, and termination of teleworking agreements.

As mentioned earlier, you will have time for questions throughout the course, and our culminating activity is to work through some scenarios that may occur with your employees.

>> NEXT SLIDE

SHOW: Slide 10

TIME: 2 minutes



STATE:

Let's talk a little bit about the Learning Journal with which you have been provided. This journal contains all of the slides and any additional information to go along with each one. There are activity pages and space for note-taking. The Appendices in the back contain a glossary, a bargaining unit comparison chart, a locality pay chart, and the web address for a new EPA Telework website. This website has links for information, forms, and region specific technology job aids. You also will have access to a Frequently Asked Questions (FAQ) document that is specifically for supervisors, and we have some links for developing performance standards that may be helpful for all of your workers.

>> NEXT SLIDE

HOW: Slide 11

TIME: 1 minute



STATE:

And now, before we get started with the first section, to get a feel for who we have attending today, I'd like you to raise your hand if you currently telework yourself.

View and comment on number of hands raised

How many of you currently manage teleworkers?

View and comment on the number of hands raised

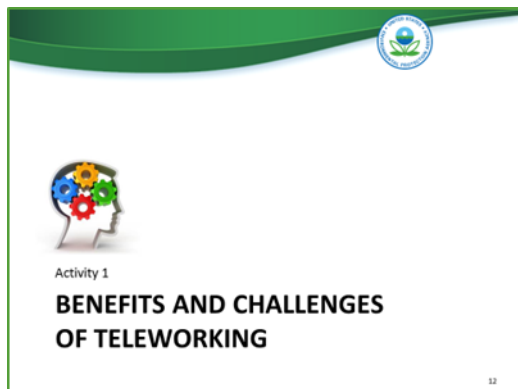
Ok, great! Thank you for responding. We will now move on our first activity.

>> NEXT SLIDE

Activity 1: Benefits and Challenges of Teleworking (20 minutes)

SHOW: Slide 12

TIME: 5 minutes



STATE:

Our first activity is to share some high level benefits and challenges for teleworking.

First, I'd like you to think of benefits and challenges for teleworking. In your Learning Journal on page 5, list 2-4 benefits and challenges for either a supervisor or an employee or both. After 5 minutes, we'll share some of your ideas.

Provide 5 minutes for the attendees to complete this

Okay, let's review what you have listed. Who would like to tell me one **benefit** for teleworking?

Find a volunteer who will report a benefit

Is there someone who has another benefit?

Continue in this way, asking for one “new” benefit from the attendees. After you have a few answers,

Now we’ll compare your choices to the ones we have listed.

>> NEXT SLIDE

SHOW: Slides 13-14

TIME: 8 minutes



STATE:

As you are listing these benefits, make note of those mentioned or not

For employee benefits we have:

- Greater flexibility in accomplishing their work while also meeting personal and community responsibilities
- Helps to reduce stress by decreasing commuting time, freeing that time up to accomplish family and personal matters
- Helps to free the employee from office distractions, which may be particularly important when working on a complex project
- Encourages commitment to an agency - when employees feel they have greater control over their work environment, they tend to feel more committed to and engaged with their organizations

>> NEXT SLIDE

**STATE:**

As you are listing these benefits, make note of those mentioned or not

For supervisor benefits we have:

- Helps with recruiting and retaining the best possible workforce
- Ensures Continuity of Operations and maintains operations during emergency events
- Promotes management effectiveness by targeting reductions in management costs related to employee turnover and absenteeism
- Reduces transit costs, and environmental impact

>> NEXT SLIDE

SHOW: Slide 15

TIME: 7 minutes

**STATE:**

And now let's list some challenges. Does anyone have one they'd like to share?

As participants report challenges, write them on the flip chart/ large Post-It.

After 5 minutes, discuss some of the challenges that have been listed. If solutions or strategies are covered in the training, be sure to mention this to the participants. Also ask for solutions or strategies from other attendees.

Okay, so now we have reviewed some benefits and challenges of teleworking and can tell that many of you recognize the same ones. Hopefully this training will help you to realize how the challenges can be overcome.

>> NEXT SLIDE

Section 2: Policy Overview (30 minutes)

SHOW: Slide 16

TIME: 1 minute



STATE:

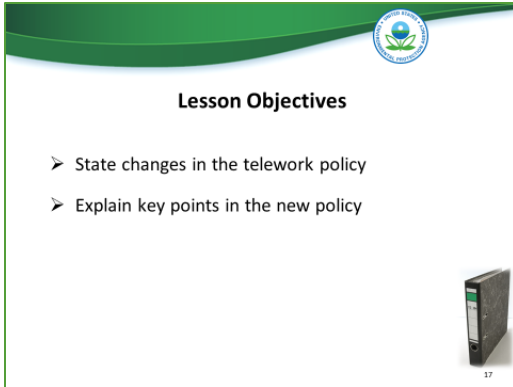
And now we will continue with our first section, the Policy Overview section. Please remember that this is an overview of the policy and we will be getting into more detail as we move through the course.

Let's review the objectives for this section.

>> NEXT SLIDE

SHOW: Slide 17

TIME: 1 minute



Slide 17 features a green header with a circular logo on the right. The title "Lesson Objectives" is centered. Below it, two bullet points are listed: "➤ State changes in the telework policy" and "➤ Explain key points in the new policy". A small image of a binder is in the bottom right corner, and the number "17" is at the very bottom.

Lesson Objectives

- State changes in the telework policy
- Explain key points in the new policy

STATE:

Throughout this section, we will be learning about the changes in the telework policy, as well as reviewing many key points in the policy. Some of these points include full-time telework, recalls, and office closures.

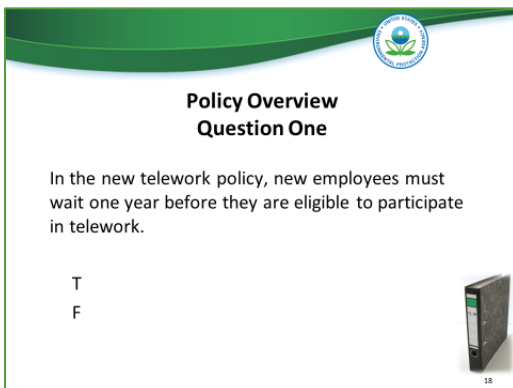
First, let's have you take a mini-quiz on policy information. You can record your answers to the questions in your Learning Journal, starting on page 7. After each question, we'll provide the answer, and we will go into detail for each one in the following section.

Ready for question 1?

>> NEXT SLIDE

SHOW: Slide 18

TIME: 1 minute



Slide 18 features a green header with a circular logo on the right. The title "Policy Overview" is centered, followed by "Question One". Below this, a paragraph states: "In the new telework policy, new employees must wait one year before they are eligible to participate in telework." At the bottom left, the letters "T" and "F" are listed vertically. A small image of a binder is in the bottom right corner, and the number "18" is at the very bottom.

Policy Overview
Question One

In the new telework policy, new employees must wait one year before they are eligible to participate in telework.

T
F

STATE:

Question 1: In the new telework policy, new employees must wait one year before they are eligible to participate in telework. True or False?

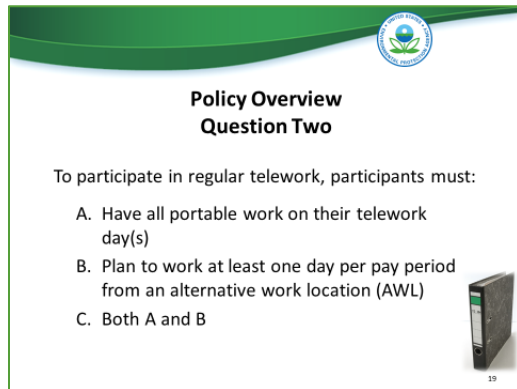
****Click mouse to show the answer.**

That is False. We'll cover this requirement early in this section.

>> NEXT SLIDE

SHOW: Slide 19

TIME: 1 minute



STATE:

Question 2: To participate in regular telework, participants must: A) Have all portable work on their telework day(s), B) Plan to work at least one day per pay period from an alternative work location (AWL), or C) Both A and B

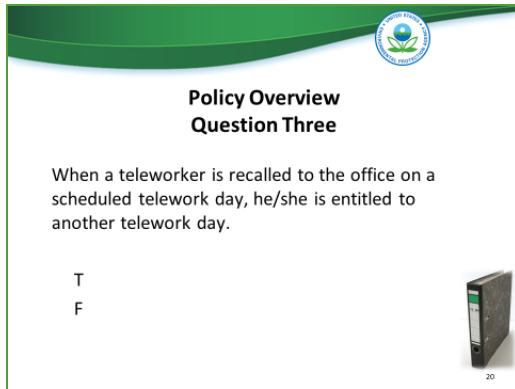
****Click mouse to show the answer.**

The correct answer is C. They must have all portable work on their telework day(s), and plan to work at least one day per pay period from an alternative work location (AWL).

>> NEXT SLIDE

SHOW: Slide 20

TIME: 1 minute

**STATE:**

Question 3: When a teleworker is recalled to the office on a scheduled telework day, he/she is entitled to another telework day. True or False?

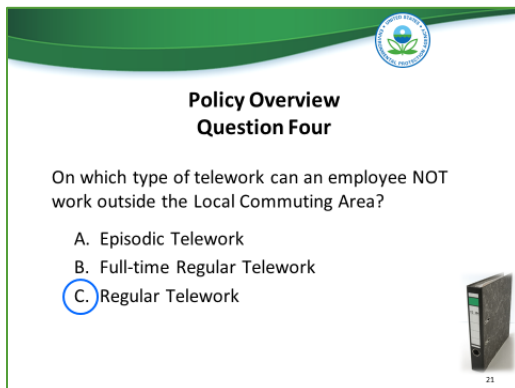
****Click mouse to show the answer.**

That is False. They may ask, but they are not entitled to another telework day.

>> NEXT SLIDE

SHOW: Slide 21

TIME: 1 minute

**STATE:**

Question 4: On which type of telework can an employee NOT work outside the Local Commuting Area? A) Episodic Telework, B) Full-time Regular Telework, or C) Regular Telework

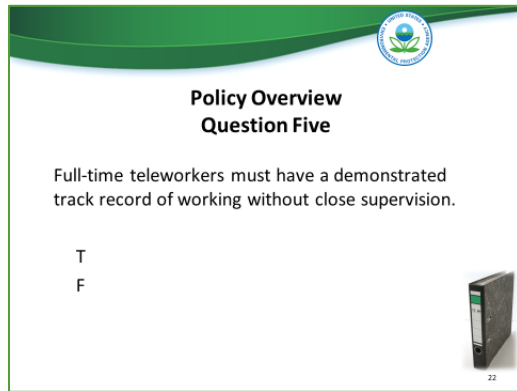
****Click mouse to show the answer.**

The correct answer here is C, Regular Telework.

>> NEXT SLIDE

SHOW: Slide 22

TIME: 1 minute



STATE:

And Question 5: Full-time teleworkers must have a demonstrated track record of working without close supervision. True or False?

****Click mouse to show the answer.**

The correct answer here is T, this is a requirement for full-time telework.

Okay, how did you do? Did anyone know them all?

We'll move on to reviewing the policy now. I do want to mention that if a bargaining unit has notable differences to what we are presenting from the policy, we will make note of that fact. Also, AFGE has not ratified a new CBA. Therefore, AFGE employees are still working under their existing agreement. If there are questions about the existing agreements, you should contact your LER representative.

Also, I'd like to draw your attention to the chart included with your Learning Journal that shows a comparison between each collective bargaining agreement. You can find this in Appendix B on page 39.

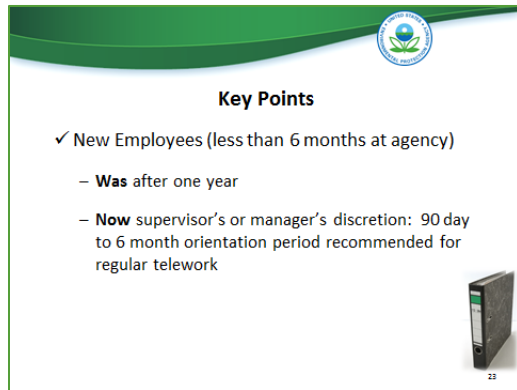
The policy is specifically for non-bargaining employees. The differences provided are for those employees under a collective bargaining agreement.

Each bargaining unit is referred to by its letters...for example, A, F, G, E. The bargaining units are: NAIL, NAGE, ESC, AFGE, and NTEU.

>> NEXT SLIDE

SHOW: Slide 23

TIME: 1 minute



STATE:

Here is a major change in the new policy. For new employees, and by new we mean less than 6 months at the agency, the policy used to state that they had to wait one year before being allowed to telework. The new policy now states that the time is up to a supervisor's or manager's discretion, with a 90 day to 6 month orientation recommended for regular telework.

During this orientation period, employees are encouraged to get experience in their organization or work unit before requesting telework. However, supervisors and managers are encouraged to grant telework on an episodic basis, (e.g., for a management declared weather event, emergency, or other disruption), to the extent appropriate, as new employees become familiar with work requirements.

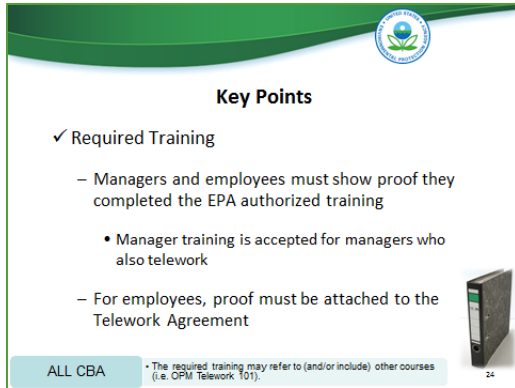
In addition to the eligibility requirements for agency employees as noted earlier, supervisors or managers authorizing telework for new employees should, at a minimum, also consider the following factors:

- Previous federal service, if any
- Length and nature of previous work experience
- Any previous experience teleworking

>> NEXT SLIDE

SHOW: Slide 24

TIME: 1 minute



Slide 24 features a green header with a circular logo on the right. The main content is titled "Key Points" and lists requirements for training. A small image of a binder is on the right side of the slide. A footer bar contains the text "ALL CBA" and a note about training courses.

Key Points

- ✓ Required Training
 - Managers and employees must show proof they completed the EPA authorized training
 - Manager training is accepted for managers who also telework
 - For employees, proof must be attached to the Telework Agreement

ALL CBA • The required training may refer to (and/or include) other courses (i.e. OPM Telework 101).

24

STATE:

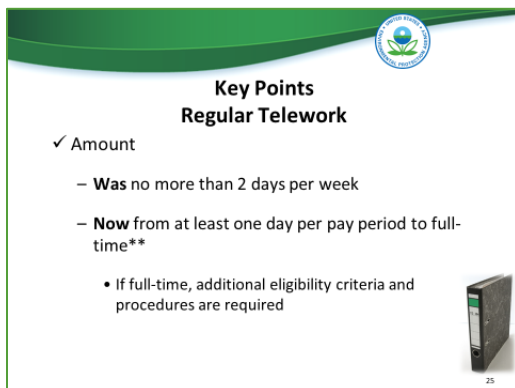
And in the new policy, supervisors, managers and employees are required to show proof that they completed the EPA authorized training. For all employees who telework, that proof must be attached to their Telework Agreement. A note here: if a supervisor or manager also teleworks, he or she can use the supervisor training to meet this requirement.

If anyone questions CBAs that are not yet in place, note the fact that the required training may include other courses.

>> NEXT SLIDE

SHOW: Slide 25

TIME: 1 minute



Slide 25 features a green header with a circular logo on the right. The main content is titled "Key Points Regular Telework" and lists requirements for telework amount. A small image of a binder is on the right side of the slide.

Key Points Regular Telework

- ✓ Amount
 - **Was** no more than 2 days per week
 - **Now** from at least one day per pay period to full-time**
 - If full-time, additional eligibility criteria and procedures are required

25

STATE:

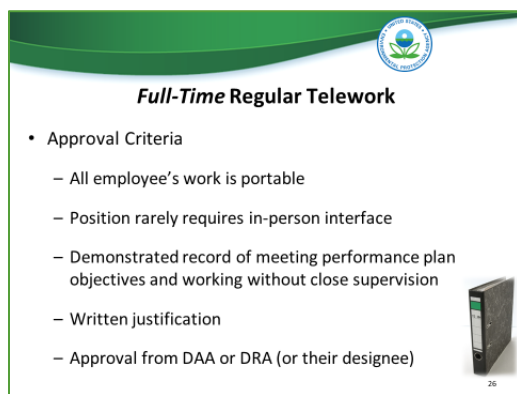
Another major change in the new telework policy is that employees may now request to telework full-time. Where the policy used to allow no more than 2 days per week, now an employee can request anywhere from at least one day per pay period to full-time.

Because this is a significant change, let's quickly review the criteria required for someone to telework full-time.

>> NEXT SLIDE

SHOW: Slide 26

TIME: 2 minutes

**STATE:**

Approval for Full-Time telework should only be authorized when all of the following criteria are met:

- All of the employee's work is portable

We will go into more detail later about portable work, but this is work that can be done at an alternate work location.
- The employee's position rarely requires in-person interface with management officials and other employees

Notes on what is meant by "rarely requires"

This should be decided on a case-by-case basis, based on the needs of the position. Some examples of how this has been applied:

- a. An employee helping EPA implement a rule with the states would require minimal in-person interface in the office, and can likely perform most of his duties using other

communication tools. His duties do not require regular collaboration with colleagues, he does not have any on-site customers, and he does not need access to any confidential material that is only available on-site.

b. A program manager of a current “hot” initiative, who must frequently brief senior management and be in the office to effectively handle day-to-day changes, would not be eligible to participate in full-time telework. While the employee technically “could” telework with the communication tools available, the employee’s presence on-site is significantly more effective. Teleworking should be handled “seamlessly” – and with this employee, their **presence** is a key component of getting the job done.

- The employee has a demonstrated track record of meeting performance plan objectives and working without close supervision
- Justification for full-time telework
- The DAA or DRA (or their designee) has approved the request for full-time telework based on a determination that an employee meets all required criteria in this section

Please note that a supervisor may approve regular telework that is less than full-time. However, a **DAA or DRA must approve full-time** telework and there must be justification for full-time telework.

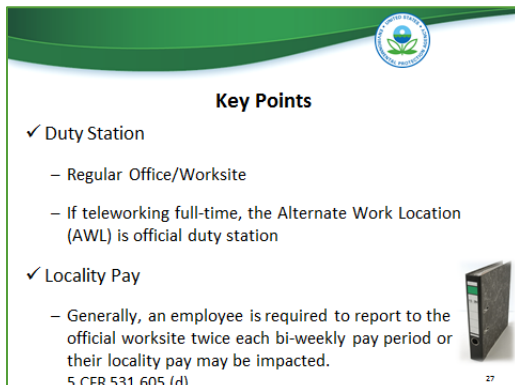
We will cover more details on the process of the full-time telework process in a section later in the training.

Now, let’s review information about where someone might telework.

>> NEXT SLIDE

SHOW: Slide 27

TIME: 2 minutes



Key Points

- ✓ Duty Station
 - Regular Office/Worksite
 - If teleworking full-time, the Alternate Work Location (AWL) is official duty station
- ✓ Locality Pay
 - Generally, an employee is required to report to the official worksite twice each bi-weekly pay period or their locality pay may be impacted. 5 CFR 531.605 (d)

STATE:

Here, we will discuss Duty Stations, Locality pay, and the Local Commuting Area.

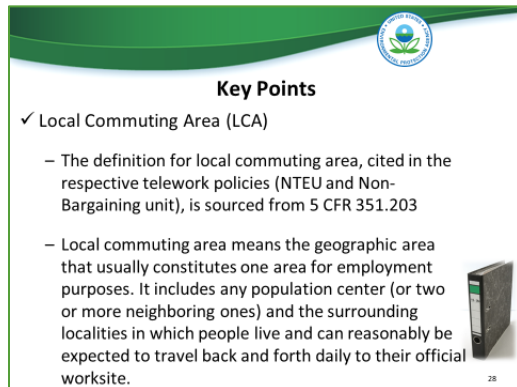
The employee's regular office/worksite is their duty station. When an employee is approved to telework full-time, the official worksite is the Alternative Work Location (AWL).

Locality pay can be affected, depending on the official duty station. Generally, an employee on episodic or medical telework is required to report to their official duty station twice each pay period or their locality pay may be impacted. Please see the chart in Appendix C on page 45 of your learning journal for more details on the basis of locality pay.

>> NEXT SLIDE

SHOW: Slide 28

TIME: 3 minutes

**STATE:**

The definition of a Local Commuting Area or LCA, has been sourced from the Code of Federal Regulations.

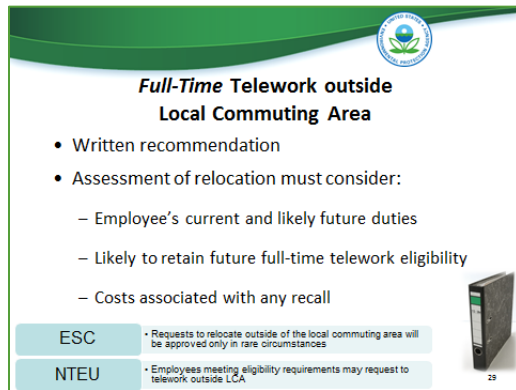
- Local Commuting Area means the geographic area that usually constitutes one area for employment purposes.
- It includes any population center (or two or more neighboring ones) and the surrounding localities in which people live and can reasonably be expected to travel back and forth daily to their official worksite.

There are special processes and procedures to follow if a full-time teleworker requests to work outside of the local commuting area.

>> NEXT SLIDE

SHOW: Slide 29

TIME: 2 minutes



STATE:

In order to perform full-time telework outside the LCA, employees must receive a written recommendation from their supervisor or manager. This is submitted by the supervisor to the DAA or DRA (or their designee) and must clearly explain how the employee is fully able to perform all of his or her duties effectively from the remote location, so that approval of the request will not, under any circumstances, diminish the agency's ability to accomplish its mission and meet its operational goals.

When assessing relocation requests, the supervisor or manager must, at a minimum consider:

- the employee's current and likely future duties
- whether or not the employee is likely to retain full-time telework eligibility in the future
- the costs associated with any recall that may be necessary (particularly those requesting to relocate significantly outside of the local commuting area)
 - All full-time teleworkers, regardless of the location of the AWL, will be reimbursed for recall costs.

Full-time teleworkers are not eligible for a transit subsidy, so therefore, they must be paid for recall to the regular office/worksite

This documentation must be approved and signed by the DAA/DRA (or their designee). If the request is not approved, the DAA/DRA (or his/her designee) will respond in writing with the reasons the request was denied.

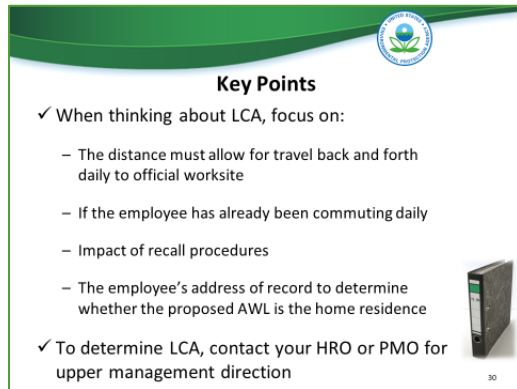
Notice that the ESC agreement states that "Requests to relocate outside of the local commuting area will be approved only in rare circumstances", and the NTEU contract states that "Employees meeting eligibility requirements may request to telework outside local commuting area."

Okay, let's now review some key points about the local commuting area in general.

>> NEXT SLIDE

SHOW: Slide 30

TIME: 2 minutes



STATE:

Supervisors and managers will have to assess the local commuting area on a case by case basis, with specific focus on the following:

- The distance must allow for the reasonable expectation of the employee to travel back and forth daily to their official worksite
- Another assessment is whether the employee has already been commuting daily, to and from work, from the proposed AWL
- Supervisors and managers should also assess the impact of recall procedures and whether employees can reasonably return to the office
 - Employees are usually given 24 hours advance notice for recalls, but in limited circumstances, the recall may be less than 24 hours
 - Employees who are unable to return to the office pursuant to the recall procedure are in violation of their telework agreement. If this results in a pattern, managers and supervisors would have valid reason to change or terminate telework agreement
- Managers and supervisors can also assess the employee's address of record to determine whether the proposed AWL is the home residence

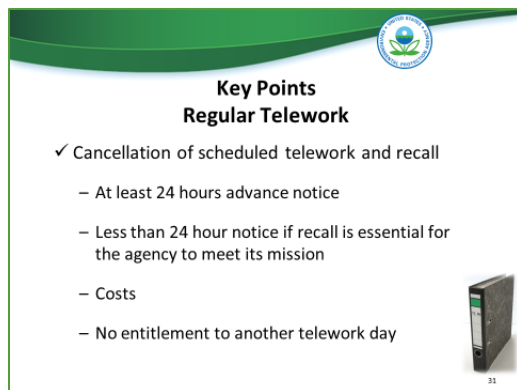
When determining the LCA, contact your HRO or PMO for upper management direction.

Some other situations that may arise that affect teleworkers include recall and office closures.

>> NEXT SLIDE

SHOW: Slide 31

TIME: 1 minute



STATE:

A supervisor or manager may recall an employee to the regular office/worksite by notifying them at least 24 hours in advance for, but not limited to:

meetings, briefings, special assignments, training, travel, unscheduled absence of other employees, emergencies or other situations deemed necessary by the supervisor or manager to meet mission, staffing, and workload requirement

A supervisor or manager may also recall an employee to the regular office/worksite with **fewer** than 24 hours when recall is essential for the agency to meet its mission and the employee is not prevented from commuting to the regular office/worksite.

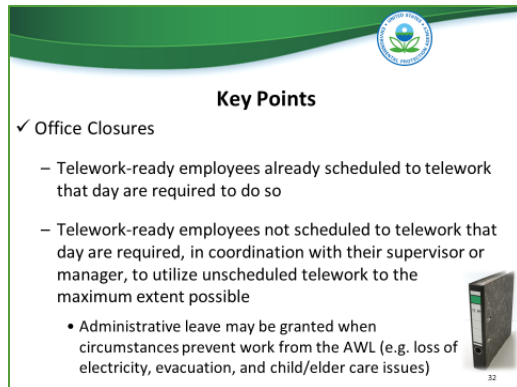
The agency will not be responsible for nor reimburse any costs associated with an employee whose AWL is outside of the local commuting area, including those incurred in the event the employee is recalled or required to return to their regular office/worksite, **except in the case of a full-time teleworker**. Note: **All full-time teleworkers**, regardless of the location of the AWL, will be reimbursed for recall costs.

An employee may request, but, is not entitled to another telework day as a result of being recalled to the regular office/worksite on an otherwise scheduled telework day, or for any other reason being unable to telework on a scheduled day.

>> NEXT SLIDE

SHOW: Slide 32

TIME: 1 minute



STATE:

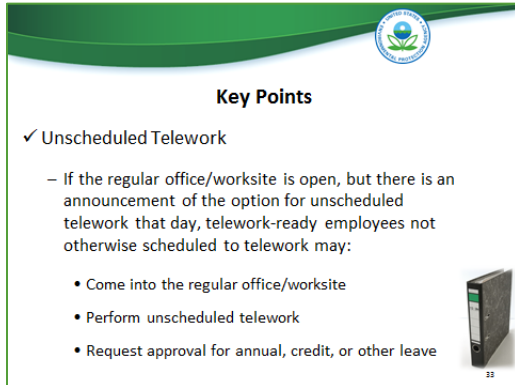
In the event of an office closure, telework-ready employees already scheduled to telework that day are required to do so.

Telework-ready employees not scheduled to telework that day are required, in coordination with their supervisor or manager, to utilize unscheduled telework to the maximum extent possible, subject to available portable work. If there is insufficient portable work as determined by the supervisor or manager, the employee may be granted administrative leave to cover all or a portion of the scheduled workday. Also, administrative leave may be granted when circumstances prevent work from the AWL for example, in the case of loss of electricity, evacuation, and child/elder care issues.

It is recommended that supervisors or managers and employees coordinate in advance if there is an anticipated event that may disrupt normal office operations to ensure that employees have portable work and the necessary equipment to perform telework during a regular office/worksite closure to the extent possible.

Now let's review the options in the case of unscheduled telework.

>> NEXT SLIDE

SHOW: Slide 33**TIME:** 1 minute


Key Points

✓ Unscheduled Telework

- If the regular office/worksite is open, but there is an announcement of the option for unscheduled telework that day, telework-ready employees not otherwise scheduled to telework may:
 - Come into the regular office/worksite
 - Perform unscheduled telework
 - Request approval for annual, credit, or other leave

STATE:

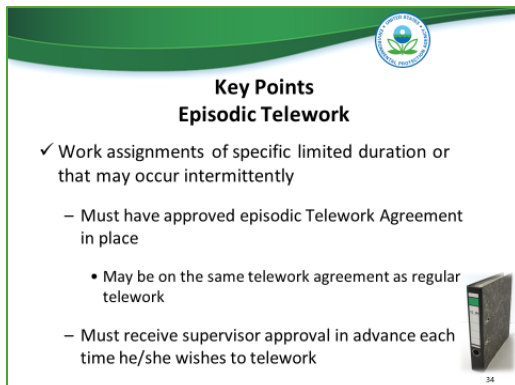
In the event, that the regular office/worksite is open, but there is an announcement of the option for unscheduled telework that day, telework-ready employees not otherwise scheduled to telework may:

- Come into the regular office/worksite
- Perform unscheduled telework
- Request approval for annual, credit, or other leave

For further information in the event of inclement weather, employees in the Washington, DC area should review the Inclement Weather chart on the EPA telework website (<http://workplace.epa.gov/telework.html>). Federal employees in geographic areas outside of the Washington, DC area should contact their supervisor, RHRO, and/or Telework Coordinator for guidance.

Now let's move to another type of telework...Episodic Telework

>> NEXT SLIDE

SHOW: Slide 34**TIME:** 1 minute


Key Points

Episodic Telework

✓ Work assignments of specific limited duration or that may occur intermittently

- Must have approved episodic Telework Agreement in place
 - May be on the same telework agreement as regular telework
- Must receive supervisor approval in advance each time he/she wishes to telework

STATE:

So far, we have been reviewing regular telework. Another type of telework is Episodic telework. This form of telework is appropriate for work assignments of specific limited duration or that may occur intermittently as opposed to regular telework.

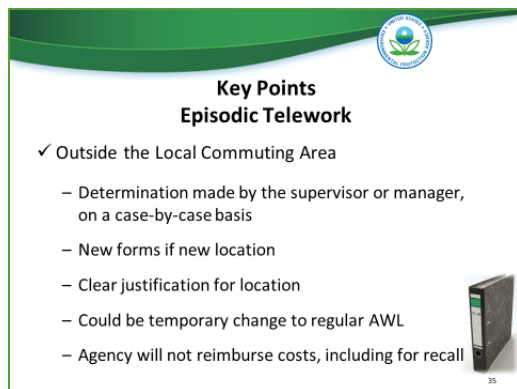
An employee must have an approved episodic Telework Agreement in place and receive supervisor approval in advance each time he/she wishes to telework.

- An employee can select both regular and episodic telework on the same agreement.

>> NEXT SLIDE

SHOW: Slide 35

TIME: 2 minutes

**STATE:**

In limited circumstances, for episodic telework, supervisors or managers may approve employees to work at an AWL that is outside of the local commuting area.

This determination will be made by the supervisor or manager, on a case-by-case basis and provided that the employee meets all telework eligibility requirements.

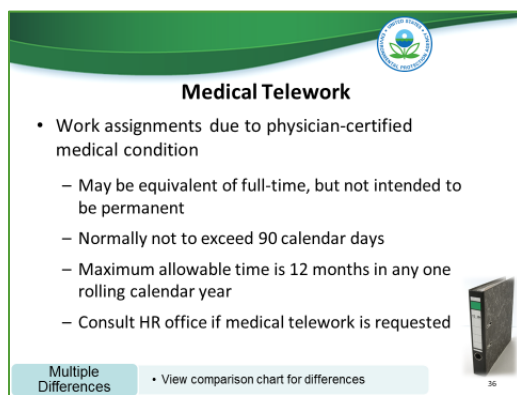
- If an employee requests episodic outside the LCA and the location is not on a telework agreement, there are forms that must be filled out, designating the different address.
- EPA managers and supervisors should develop a clear justification for approval of telework outside of the commuting area, considering continuity and efficiency of the office, reliability and use of alternative communication mechanisms, employee performance, team cohesion and interaction, customer service needs, and needs of agency leadership.
- If an employee requests a temporary change (1-2 days) to the location of their regular telework AWL, then that teleworker must submit an episodic request.

The agency will not be responsible for nor reimburse any costs associated with an employee's AWL outside of the local commuting area, including those incurred in the event the employee is recalled or required to return to their official work site.

>> NEXT SLIDE

SHOW: Slide 36

TIME: 1 minute



STATE:

Approach this section as a topic only included because it is a type of telework. No issues will be addressed in this training for this type of telework.

This part of the policy section, Medical telework, is included in this training; however, we will not be addressing specific questions on this type of telework. We are only providing general information.

This form of telework allows for the continued accomplishment of the agency work while an employee has a physician-certified medical condition, which does not affect the employee's ability to perform his or her regular work assignment at an AWL.

This type of telework may be the equivalent of full-time, but is not intended to be a permanent arrangement and will normally not exceed 90 calendar days. After 90 calendar days, a medical telework agreement may be extended for up to three additional 90-day periods (i.e., nine months) if the additional medical certification justifies such at each extension (i.e., every 90 calendar days).

The total maximum allowable time for a medical telework agreement is 12 months in any one rolling calendar year.

There are a few differences in the various union agreements, which you can view in the comparison chart in Appendix B.

>> NEXT SLIDE

SHOW: Slide 37

TIME: 2 minutes



STATE:

Does anyone have any general questions from this policy section?

Check for questions. If the questions are specific, try to redirect the attendees to asking more high level, general questions. The telework coordinator or the LER may be able to answer specific questions later or reply via email if necessary.

Okay, let's move to our next section...

>> NEXT SLIDE

Section 3: Technology Tools for a Virtual Office (15 minutes)

SHOW: Slide 38

TIME: 1 minute



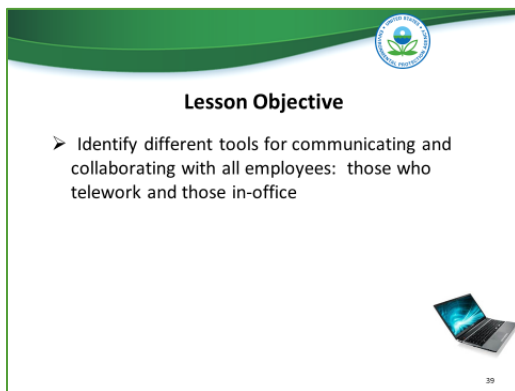
STATE:

...Technology Tools for a Virtual Office. This section introduces technology tools that are useful when managing an office that is staffed by both teleworkers and in-office employees.

>> NEXT SLIDE

SHOW: Slide 39

TIME: 1 minute



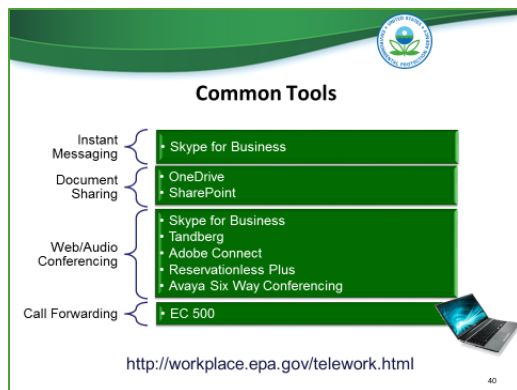
STATE:

We will be discussing what the tools are and how they can be used to facilitate seamless communication and collaboration within an office. Later in the course, we will discuss specific questions about technology use by teleworkers to communicate while they are in their AWL.

>> NEXT SLIDE

SHOW: Slide 40

TIME: 5 minutes



STATE:

We have listed here some of the common technology tools that are available to you that will assist you and your employees to communicate and collaborate when you have both teleworkers and in-office workers.

For more information on the tools and how to use them, and for region specific tools, you can view the website at: <http://workplace.epa.gov/telework.html>. Also, your local help desks and the Microsoft “How To” help center are available to answer questions. These websites are listed in your learning journal **on page 17**.

Let’s determine how many of you have used these common tools. If you have, please raise your hand as I read them.

Read the names of the tools and watch for a show of hands.

- Skype for Business
- OneDrive
- SharePoint
- Adobe Connect (and Seminar)
- Tandberg
- Avaya Six Way Conferencing
- Reservationless-Plus (and Seminar)
- EC500

When you need help with the tools, you can consult the website. Also, it is a good idea to hold some “virtual time” with your employees in the office, so they are ready to telework when scheduled.

If anyone asks about Reasonable Accommodation, let them know that there is a Reasonable Accommodations office available for assistance.

Let's spend some time discussing the situations in which these tools can or should be used.

>> NEXT SLIDE

SHOW: Slide 41

TIME: 5 minutes



STATE:

As we discuss using these tools, please use page 18 in your Learning Journal to record the ones you can use.

Lead a discussion and ask for suggestions on which tools can be used for which office need. Answers are provided, but let the attendees share what they use as well. Note: each region may have access to different tools

Which tool or tools would you use for each of these actions?

Meet with one employee or my entire team

- Virtual Meeting using Skype for Business or Adobe Connect
- Audio Conference with Skype for Business, Tandberg, Avaya, or Reservationless-Plus

Enable my team to work on the same document

- File Sharing with Office 365 - OneDrive or SharePoint

Provide checklists for work projects

- File Sharing with Office 365 - OneDrive or SharePoint

Enable my team to communicate quickly during the workday

- Instant Messaging using Skype for Business

Provide training for my team to include video

- Video Conference using Skype for Business, Adobe Connect, or Tandberg

Provide a way for my employees to use call forwarding

- EC500

>> NEXT SLIDE

SHOW: Slide 42

TIME: 3 minutes



STATE:

Does anyone have any general questions about technology tools for the office?

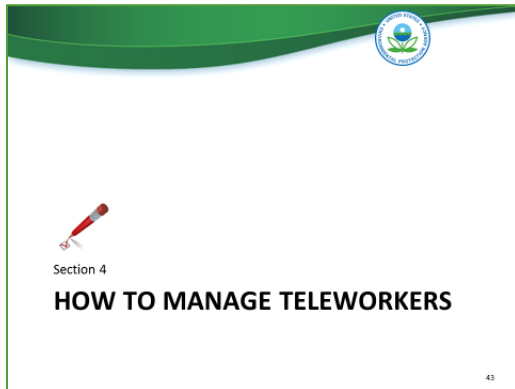
Check for questions. If the questions are specific, try to redirect the attendees to asking more high level, general questions. The IT Help Desk or their IT POC may be able to answer specific questions later or reply via email if necessary.

>> NEXT SLIDE

Section 4: How to Manage Teleworkers (30 minutes)

SHOW: Slide 43

TIME: 1 minute



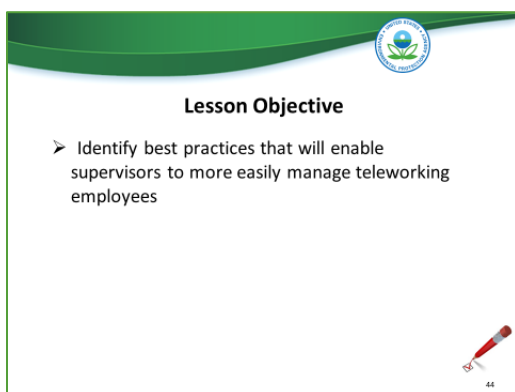
STATE:

This section is titled How to Manage Teleworkers. We will discuss points to remember when managing teleworkers, including general information, specific supervisor and employee expectations, management techniques, technology equipment, and work schedules.

>> NEXT SLIDE

SHOW: Slide 44

TIME: 1 minute



STATE:

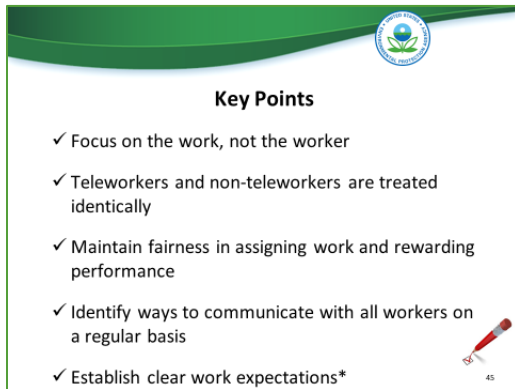
The lesson objective here is to identify best practices that will enable you to more easily manage teleworking employees. Again, in this section, if a bargaining unit has notable

differences to what we are presenting from the policy, we will make note of that fact. Remember that you can refer to the comparison chart in Appendix B on page 39.

>> NEXT SLIDE

SHOW: Slide 45

TIME: 4 minutes



STATE:

When managing teleworkers, and all workers for that matter, you should remember a few key points:

You should focus on the work, not the worker.

Teleworkers and non-teleworkers are treated identically for the purposes of monitoring and assessing job performance.

Maintain fairness in assigning work and rewarding performance

Discuss issues of assigning work to in-office workers “because they are there”. Just because someone is teleworking does not mean that they are not available for new assignments. Everyone should be treated equally...teleworking employees are still working.

Identify ways to communicate with all workers on a regular basis

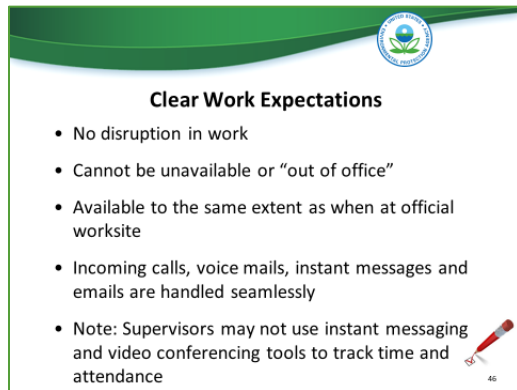
Discuss ways to communicate (telephone, skype for business, email)

Establish clear work expectations. We will take a closer look at some possible expectations on the next slide.

>> NEXT SLIDE

SHOW: Slide 46

TIME: 3 minutes



STATE:

Employees must ensure there is no disruption in work and that they are available to customers, co-workers, and supervisors.

Employees cannot be unavailable for calls, meetings, or virtual meetings in electronic calendars. They may not put on "out of office" messages on email or voicemail.

Teleworking employees must be available to the same extent as when working at their official worksite.

Employees must ensure that incoming calls, voice mails, instant messages and emails are handled seamlessly with the same expectations as if they are working in the office.

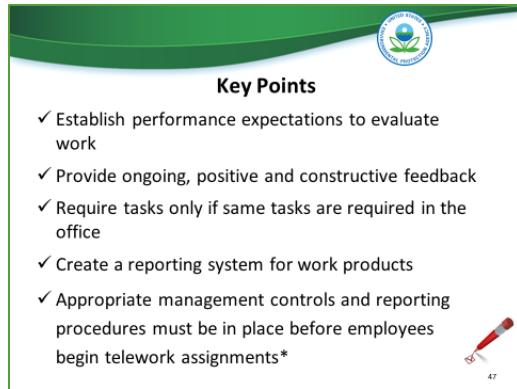
You will want to note that you may not use instant messaging and video conferencing tools to track time and attendance. For example, you can state that your expected method of communication in the office is Skype for Business. So you can require your employees to use Skype for Business, but you cannot use the "presence" feature as a means of determining whether an employee is working.

Now back to some key points for managing teleworkers.

>> NEXT SLIDE

SHOW: Slide 47

TIME: 3 minutes

**STATE:**

You should establish expectations on how work will be evaluated. **These expectations should reflect what is currently in PARS for the employee.**

When working on standards (**for all employees**) they should be: objective, realistic, reasonable, and clearly stated. In addition, in order to be useful, a standard should be: measurable, worth measuring, and understandable. With these standards in place, the expectations for the teleworker is already established.

- For example, you could use measurable customer service standards like: responding to emails within 48 hours; responding to phone calls by the end of the next business day; responding to all written correspondence within 10 business days.
- Or, for a budget report: the report is submitted by the first of the month and the employee can answer questions about the project's financial status at any time
- Also, for a records position: 98% of records will be filed within 1 day of receipt and will be completed in accordance with agency standards so that accurate information can be obtained quickly.

Ask attendees for examples of performance standards they currently incorporate, and other current evaluation techniques; can they be adapted to teleworkers?

Provide ongoing, positive and constructive feedback

- One way is to utilize one-on-ones to review progress and to clarify any questions and schedule ongoing evaluation
- Providing positive and constructive feedback tells the employee what they should continue doing, and what they need to change

Create a reporting system for work products

- Some examples might include: a checklist on SharePoint showing completion, a copy of email showing delivery of a product, a report submission receipt

Ask for current reporting systems and discuss what they are and how they can be made "telework-enabled"

For questions on developing or managing performance standards, please view the links in Appendix D on page 46. Also, if you have questions on whether the standards you develop are suitable, you may contact your LER.

We should note that appropriate management controls and reporting procedures must be in place before employees begin telework assignments. Teleworkers and non-teleworkers are treated identically for the purposes of monitoring and assessing job performance; however, supervisors and managers may need to utilize different mechanisms for communicating with teleworking employees.

Let's examine this last bullet a little bit closer.

>> NEXT SLIDE

SHOW: Slide 48

TIME: 2 minutes



STATE:

Some approved techniques, which could be applicable to telework arrangements, include:

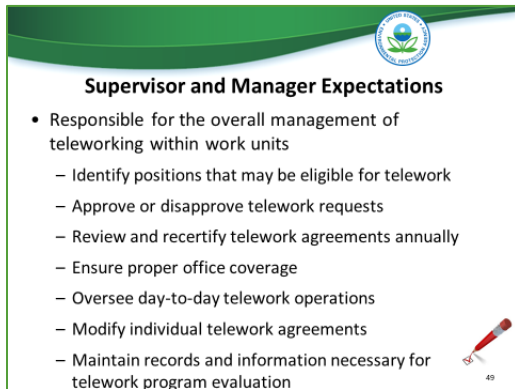
- Supervisory telephone calls or e-mail messages to an employee during times the employee is scheduled to be on duty
- Visits by the supervisor or manager to the employee's AWL
 - it is recommended that this only be done in limited circumstances where there is a suspicion of unsafe working conditions at the AWL and that managers and supervisors contact LER for guidance on how to proceed
- Using performance management systems, including regular workload/accomplishments reports for teleworking and non-teleworking employees to determine reasonableness of work output for time spent, project schedules, key milestones, quality of the work performed, and team reviews.

Remember that employees cannot be required to do certain tasks while teleworking if you do not require them to perform these tasks in the office as well.

>> NEXT SLIDE

SHOW: Slide 49

TIME: 4 minutes



STATE:

Now we should discuss supervisor and manager expectations.

Supervisors and managers are responsible for the overall management of teleworking within their work units, including:

- Working with their regional human resources officer, HR SSC, and program management officer to identify positions that may, in whole or in part, be eligible for telework and ensuring that such designations are identified in job announcements
- Approving or disapproving new or revised requests to telework (less than full-time) within a reasonable timeframe (i.e., normally within 15 calendar days) and in cases of disapproval, provide the rationale to the requesting employee
- Reviewing and recertifying employee telework agreements every 12 months
- Ensuring proper office coverage
- Overseeing day-to-day telework operations
- Modifying individual telework agreements to meet mission needs or changing circumstances
- Maintaining records and information necessary for evaluation of the program

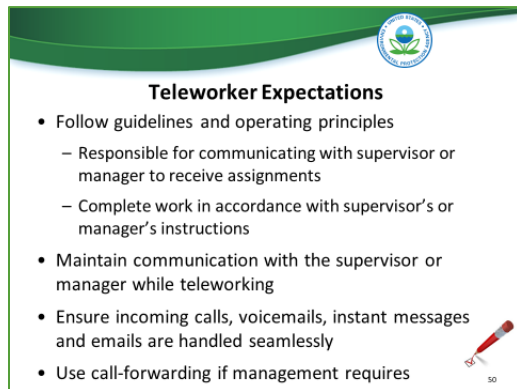
Also, supervisors and managers should ensure teleworkers are complying with all existing security policies and procedures and that their teleworkers are using the appropriate telework time reporting codes.

Teleworking is a two-way street and the emphasis for both supervisors and employees is to communicate. Let's review what you can expect from teleworkers as well.

>> NEXT SLIDE

SHOW: Slide 50

TIME: 4 minutes



STATE:

All teleworkers must follow guidelines and operating principles which include statements such as: Teleworking employees are responsible for communicating as needed with their supervisor or manager to receive assignments and complete work in accordance with supervisor's or manager's instructions.

Teleworking employees must be available and accessible to supervisors, managers, co-workers and customers while performing work at the AWL to the same extent as employees working at their official worksite.

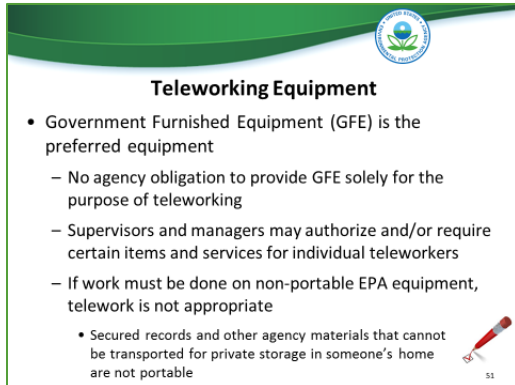
Teleworking employees must ensure that incoming calls, voicemails, instant messages and emails are handled seamlessly with the same expectations as if they were working in the official worksite.

Management discretion may require the use of call-forwarding.

>> NEXT SLIDE

SHOW: Slide 51

TIME: 2 minutes



Teleworking Equipment

- Government Furnished Equipment (GFE) is the preferred equipment
 - No agency obligation to provide GFE solely for the purpose of teleworking
 - Supervisors and managers may authorize and/or require certain items and services for individual teleworkers
 - If work must be done on non-portable EPA equipment, telework is not appropriate
 - Secured records and other agency materials that cannot be transported for private storage in someone's home are not portable

STATE:

Now we'll talk about the equipment teleworkers will use while at their AWL.

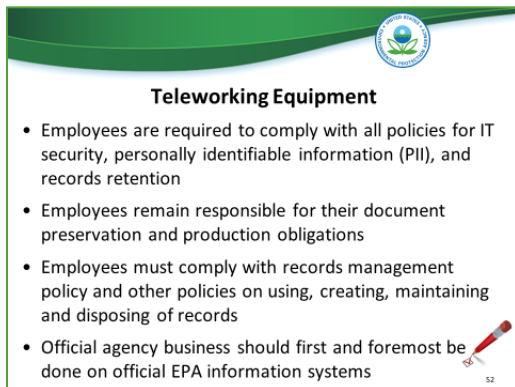
Government Furnished Equipment (GFE) is the preferred equipment.

- The agency is under no obligation to provide GFE to its employees solely for the purpose of teleworking.
- Supervisors or managers, at their discretion, and if budget permits, may authorize and/or require certain items and services for the individual teleworker, including, computers, printers, and telecommunications equipment and services.
- If work needs to be done on EPA equipment for some reason and that equipment is not portable, then telework is not appropriate.
 - Secured records and other agency materials that cannot be transported for private storage in someone's home are not portable

>> NEXT SLIDE

SHOW: Slide 52

TIME: 2 minutes



Teleworking Equipment

- Employees are required to comply with all policies for IT security, personally identifiable information (PII), and records retention
- Employees remain responsible for their document preservation and production obligations
- Employees must comply with records management policy and other policies on using, creating, maintaining and disposing of records
- Official agency business should first and foremost be done on official EPA information systems

STATE:

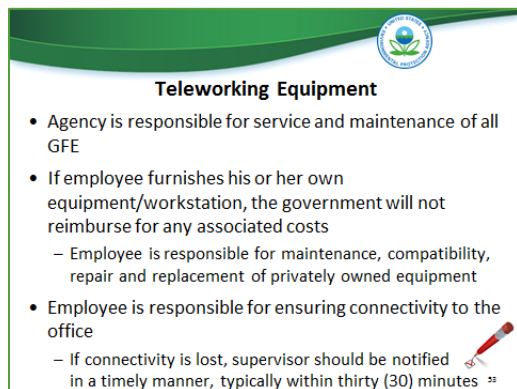
For all equipment used at the AWL, whether it is on GFE or personal equipment:

- Employees are required to comply with all policies, including the Acceptable Use Policy, for IT security, personally identifiable information (PII), and records retention.
- Employees remain responsible for their document preservation and production obligations that may arise under the Freedom of Information Act (FOIA), litigation hold or discovery order issued in litigation, or another request for information such as a Congressional request.
- Employees must continue to comply with the agency's records management policy and any other applicable policies related to using, creating, maintaining and disposing of records.
- Official agency business should first and foremost be done on official EPA information systems

>> NEXT SLIDE

SHOW: Slide 53

TIME: 2 minutes

**STATE:**

Here are a few more points about teleworking equipment.

The agency is responsible for the service and maintenance of all government-owned equipment.

If an employee furnishes his or her own equipment/workstation at the AWL, the government will not reimburse the employee for the purchasing costs of the equipment/workstation.

The government will also not pay for normal operating costs such as internet service.

The employee is responsible for the maintenance, compatibility, repair and replacement of privately owned equipment.

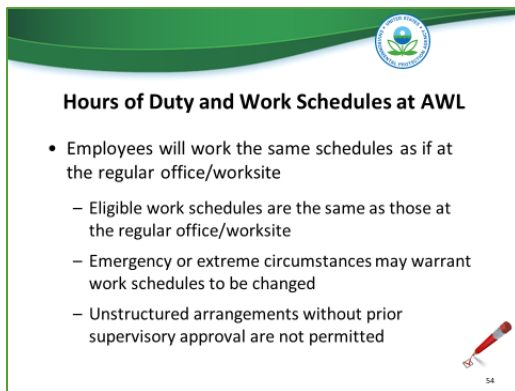
The employee is responsible for ensuring connectivity to the office, and in the event of interruption, should contact the supervisor, typically in 30 minutes, to determine if there is sufficient work to perform at the AWL or if other work arrangements should be made.

- Failure to maintain communication contact guidelines established by his/her supervisor while teleworking can be a basis for termination from the Telework Program.

>> NEXT SLIDE

SHOW: Slide 54

TIME: 2 minutes



STATE:

The last topic we are covering in this section on managing teleworkers is about Hours of Duty and Work Schedules.

Employees who telework will work the same schedules that they work at the regular office/worksites, including compressed or flexible schedules under an approved alternate work schedule plan and may not work non-standard evenings and weekend schedules.

Eligible work schedules for employees participating in telework are the same as those employees working at the regular office/worksites.

Emergency or extreme circumstances may warrant work schedules to be changed with supervisor or manager approval and in accordance with established procedures.

Unstructured arrangements where employees work at the AWL without prior supervisory approval are not permitted.

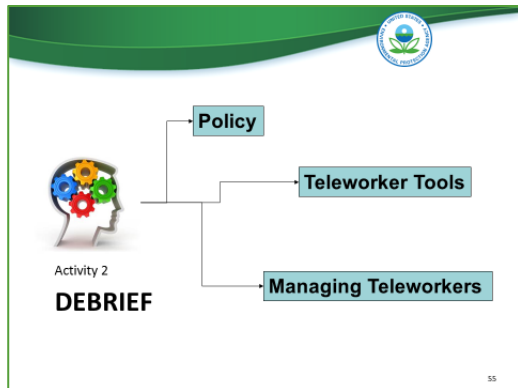
Employees must use the correct time reporting codes. These are available in the policy.

>> NEXT SLIDE

Activity 2: Debrief (10 minutes)

SHOW: Slide 55

TIME: 10 minutes



STATE:

Now we have a short time before our break to catch up and debrief on the topics we've covered so far. Does anyone have any questions about either the policy, teleworker tools, or managing teleworkers?

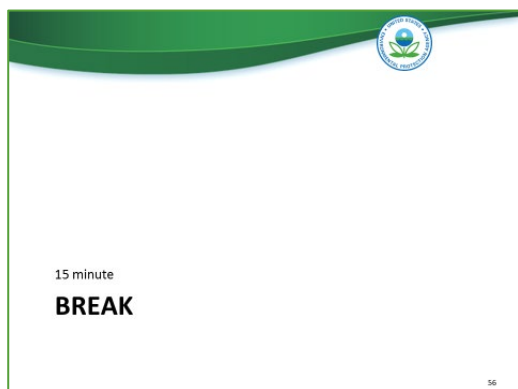
Answer any questions as necessary

>> NEXT SLIDE

Break (15 minutes)

SHOW: Slide 56

TIME: minimal



STATE:

We will now take a 15 minute break. If you leave the room, please be sure to return on time. If you stay, you can see how many national parks you can recognize in the next few slides.

See you in 15 minutes.

>> NEXT SLIDE

SHOW: Slides 57-72



TIME: 15 minutes

Once slide 57 appears, the presentation is set to switch to the following slide every minute.

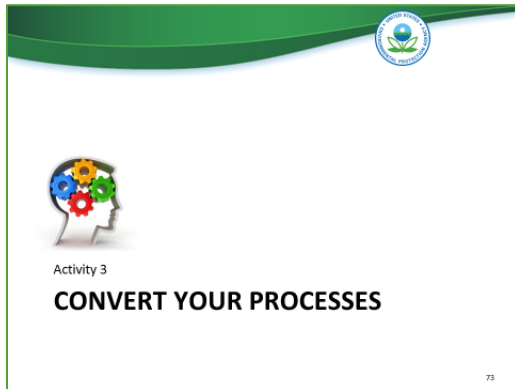
Last slide is 72

>> NEXT SLIDE

Activity 3: Convert Your Processes (20 minutes)

SHOW: Slide 73

TIME: 3 minutes



STATE:

Now you will do a something called a “Think-Pair-Share” activity. You will think of one or more processes you use that does not currently address teleworkers. Then think of how you could make it “telework-enabled”.

After you write one or more processes and “solutions”, you’ll pair up with one or 2 other people to discuss your ideas among yourselves, and then you will share your ideas with the entire class.

Please find page 27 in your Learning Journals to record your process or processes and how they can be telework-enabled.

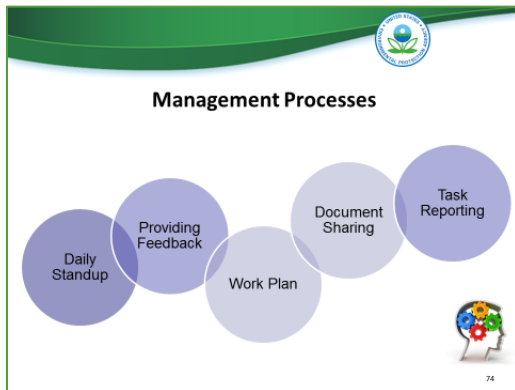
You may use the ideas on the next slide or any other information we have covered so far today, if they are relevant for your office.

>> NEXT SLIDE



SHOW: Slide 74

TIME: 17 minutes



STATE:

Suggestions might include providing feedback, daily standup, or record keeping. Let's take 3 minutes to list a process or processes and a way in which to telework-enable the process.

After 3 minutes, direct the attendees to pair up (2-3 per group) and discuss the processes and modifications.

Take 4 more minutes for this part of the activity.

Okay, now, who would like to contribute their idea to the class?

Ask for more ideas and discuss any questions or comments. Allow 10 minutes.

You had some great ideas for modifying your processes.

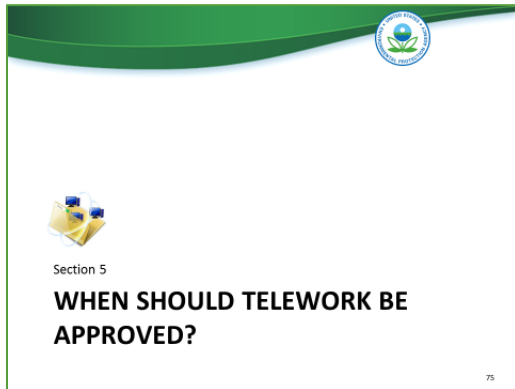
Now that we have more background on the policy, technology, and how to manage teleworkers, let's move on to our next section.

>> NEXT SLIDE

Section 5: When Should Telework be Approved? (30 minutes)

SHOW: Slide 75

TIME: minimal



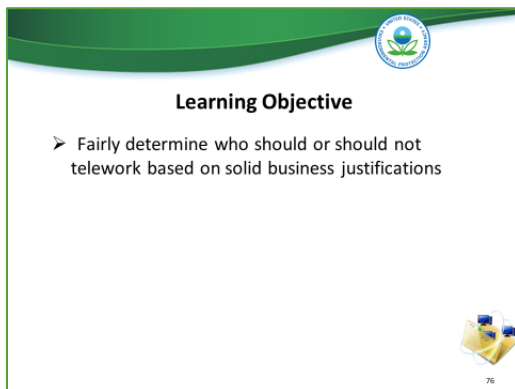
STATE:

This section is When Should Telework be Approved?

>> NEXT SLIDE

SHOW: Slide 76

TIME: 1 minute



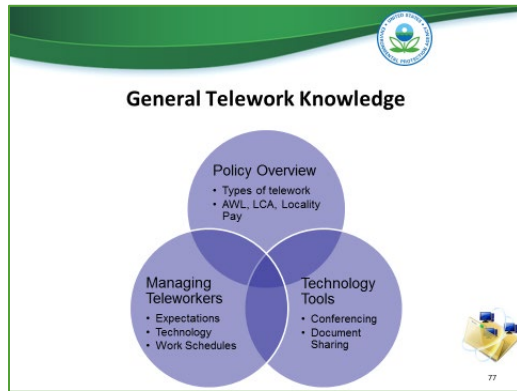
STATE:

This lesson covers the qualifications to telework, including specific requirements for full-time telework. It also includes review, recertification, and termination of teleworking agreements. At the end of this section, you should be able to fairly determine who should or should not telework based on solid business justifications.

>> NEXT SLIDE

SHOW: Slide 77

TIME: 3 minutes



STATE:

To this point in the course, you have been exposed to general telework knowledge that will assist you in making a telework decision.

Policy Overview

- Types of telework, AWL, LCA, Locality Pay, and changes to the policy

Technology Tools

- How to accomplish conferencing, document sharing, and communication

Managing Teleworkers

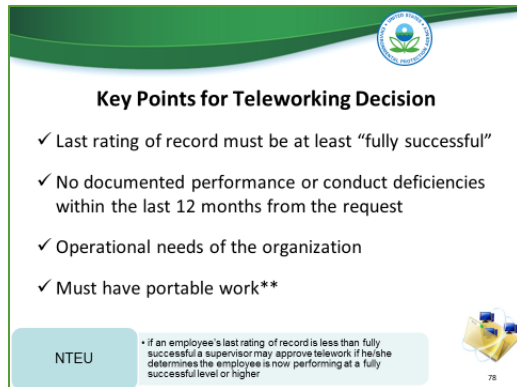
- Expectations, technology needed, work schedules

Having received all of that information, now you will learn more about the criteria needed in order to justify the approval or non-approval of a telework request.

>> NEXT SLIDE

SHOW: Slide 78

TIME: 2 minutes



STATE:

First, we will review some key points to be aware of when making a teleworking decision. We will again mention any specific differences in various contracts, which are also available in Appendix B.

The first requirement is that the employee's last rating of record must be at least "fully successful."

- Please note that NTEU language states that if an employee's last rating of record is less than fully successful a supervisor may approve telework if he/she determines the employee is now performing at a fully successful level or higher.

Next, the employee must have no documented performance or conduct deficiencies within preceding 12 months, including but not limited to letters of reprimand, written warnings or leave restrictions.

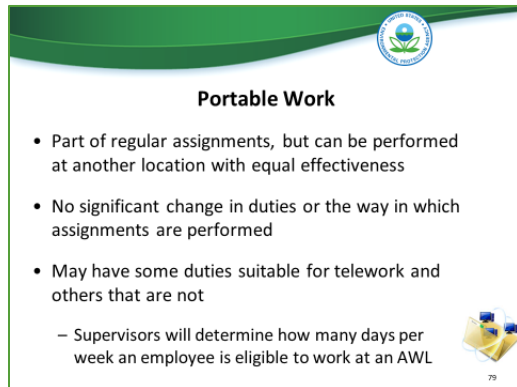
The operational needs of the organization should be taken into consideration when deciding if an employee can telework.

Employees eligible for telework must have portable work as determined by the supervisor. We will take a closer review of what is Portable Work.

>> NEXT SLIDE

SHOW: Slide 79

TIME: 2 minutes



STATE:

Portable work is part of the employee's regular assignments and normally done at the employee's official worksite, but can be performed at another location with equal effectiveness with respect to quality, timeliness, customer service, and other aspects of accomplishing the EPA's mission. Such work does not involve a significant change in duties or the way in which assignments are performed.

Several tasks and functions generally suited for telework include, but are not limited to:

- Reviewing and writing
- Policy development
- Report writing
- Research (when research tools are available at the AWL)
- Analytical work
- Telephone-intensive tasks
- Computer-oriented tasks (e.g., programming, data entry, data processing, word processing, web page design), as long as remote access is available to appropriate sites
- Virtual training

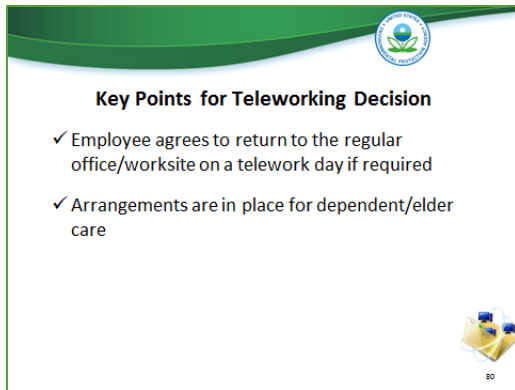
Employees may have some duties that are suitable for telework and others that are not. For these employees, supervisors and managers will need to determine how many days per week an employee is eligible to work at an AWL as part of regular telework.

>> NEXT SLIDE

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**SHOW:** Slide 80

**TIME:** 2 minutes



**STATE:**

Some other key requirements for telework include:

The employee agrees to return to the regular office/worksite on a telework day if required to do so by his or her supervisor or manager.

And, arrangements are in place for dependent/elder care, if applicable, during the time the employee is working at an AWL. When considering this issue, the policy states that:

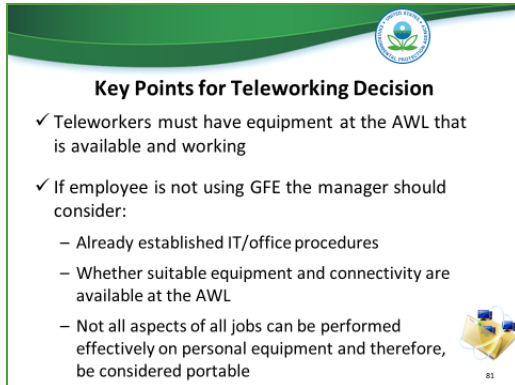
- Employees are responsible for ensuring personal disruptions such as non-business telephone calls and visitors are kept to a minimum.
- A prohibited use of telework includes substituting telework for dependent/elder care (i.e., when the home is the AWL, an employee should not be using telework as a means to care for his or her spouse, child, or relative).

>> NEXT SLIDE



**SHOW:** Slide 81

**TIME:** 2 minutes



Slide 81 features a green header with the EPA logo. The title "Key Points for Teleworking Decision" is centered. Below it, a list of bullet points is presented, each preceded by a checkmark. The points cover equipment availability at the AWL, manager considerations for non-GFE use, and the portability of jobs. A small graphic of a laptop and a folder is in the bottom right corner, and the slide number "81" is at the bottom center.

**Key Points for Teleworking Decision**

- ✓ Teleworkers must have equipment at the AWL that is available and working
- ✓ If employee is not using GFE the manager should consider:
  - Already established IT/office procedures
  - Whether suitable equipment and connectivity are available at the AWL
  - Not all aspects of all jobs can be performed effectively on personal equipment and therefore, be considered portable

**STATE:**

In addition, teleworkers must have equipment at the AWL that is available and working properly to ensure compliance with the Office of Environmental Information's technology policies and procedures.

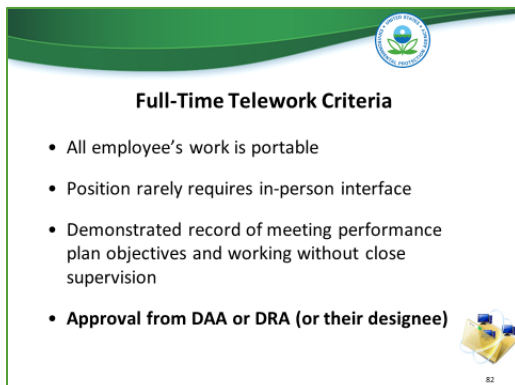
If an employee is not using GFE the manager should consider:

- Already established IT/office procedures
- Whether suitable equipment and connectivity are available at the AWL for the work to be performed
- Although many positions may be suitable for telework, not all aspects of all jobs can be performed effectively on personal equipment at an AWL and therefore, be considered portable.

>> NEXT SLIDE

**SHOW:** Slide 82

**TIME:** 2 minutes



Slide 82 features a green header with the EPA logo. The title "Full-Time Telework Criteria" is centered. Below it, a list of bullet points is presented. The criteria include portability of work, in-person interface requirements, performance record, and approval from DAA or DRA. A small graphic of a laptop and a folder is in the bottom right corner, and the slide number "82" is at the bottom center.

**Full-Time Telework Criteria**

- All employee's work is portable
- Position rarely requires in-person interface
- Demonstrated record of meeting performance plan objectives and working without close supervision
- Approval from DAA or DRA (or their designee)



**STATE:**

Before presenting the actual process for approving telework or not, let's quickly review the criteria for full-time telework.

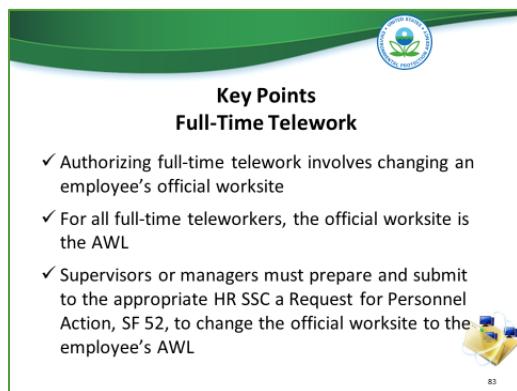
- **All** of the employee's work is portable.
- The employee's position rarely requires in-person interface with management officials and other employees.
- The employee has a demonstrated track record of meeting performance plan objectives and working without close supervision.
- The **DAA or DRA** (or their designee) has approved the request for full-time telework based on a determination that an employee meets all required criteria based on agency policy.

Now let's move to special requirements for full-time telework.

>> NEXT SLIDE

**SHOW:** Slide 83

**TIME:** 3 minutes

**STATE:**

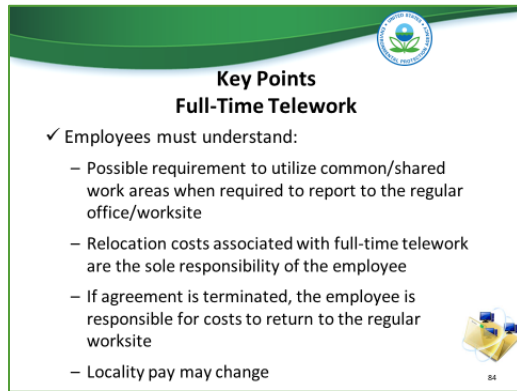
Authorizing full-time telework involves changing an employee's official worksite. For all full-time telework, the official worksite is the AWL.

- Supervisors or managers must prepare and submit to the appropriate HR SSC at least 30 calendar days prior to the effective date, the required personnel documentation (i.e., Request for Personnel Action, Standard Form 52) to change an employee's official worksite to his or her AWL.

>> NEXT SLIDE

**SHOW:** Slide 84

**TIME:** 2 minutes



**STATE:**

When approved for full-time telework, employees must understand that:

- If approved for full-time telework, he or she may be required to utilize common/shared work areas, which are not permanently assigned to any specific employee when he or she is required to report to the regular office/worksite
- Relocation costs associated with full-time telework, if applicable, are the sole responsibility of the employee
- If the agreement is terminated, the employee is responsible for all costs associated with returning to the regular office/worksite. The first-line supervisor or manager will provide a seven day (calendar) written notice of intent to terminate the agreement and the employee will have 10 days (calendar) to report to the regular office/worksite. Supervisors or managers will need to ensure adequate office space availability upon the employee's return to the regular office/worksite after termination of his or her telework agreement

Please note the process for termination may vary based on the applicable CBA.

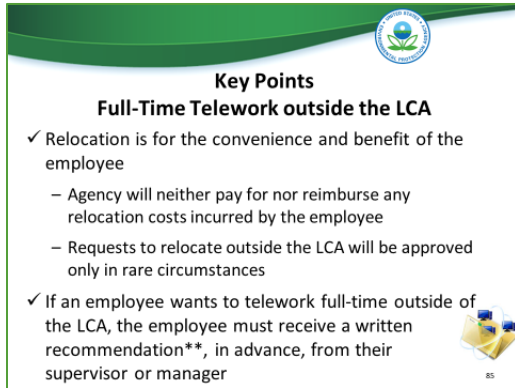
- Locality pay may change

And, now some key points for full-time telework outside the LCA.

>> NEXT SLIDE

**SHOW:** Slide 85

**TIME:** 2 minutes



**Key Points**

**Full-Time Telework outside the LCA**

- ✓ Relocation is for the convenience and benefit of the employee
  - Agency will neither pay for nor reimburse any relocation costs incurred by the employee
  - Requests to relocate outside the LCA will be approved only in rare circumstances
- ✓ If an employee wants to telework full-time outside of the LCA, the employee must receive a written recommendation\*\*, in advance, from their supervisor or manager

**STATE:**

Relocation, if approved, would be for the convenience and benefit of the employee

- the agency therefore, will neither pay for nor reimburse any relocation costs incurred by the employee
- requests to relocate outside the LCA will be approved only in rare circumstances

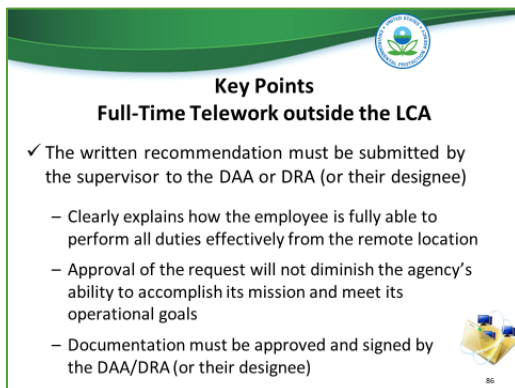
If an employee wants to telework full-time, outside of the local commuting area, he or she must receive a written recommendation for doing so, in advance, from their supervisor or manager.

The written recommendation must...

>> NEXT SLIDE

**SHOW:** Slide 86

**TIME:** 3 minutes



**Key Points**

**Full-Time Telework outside the LCA**

- ✓ The written recommendation must be submitted by the supervisor to the DAA or DRA (or their designee)
  - Clearly explains how the employee is fully able to perform all duties effectively from the remote location
  - Approval of the request will not diminish the agency's ability to accomplish its mission and meet its operational goals
  - Documentation must be approved and signed by the DAA/DRA (or their designee)

**STATE:**

... be submitted by the supervisor or manager to the DAA or DRA (or their designee) and must clearly explain how the employee is fully able to perform all of his or her duties effectively from the remote location, so that approval of the request will not, under any circumstances, diminish the agency's ability to accomplish its mission and meet its operational goals.

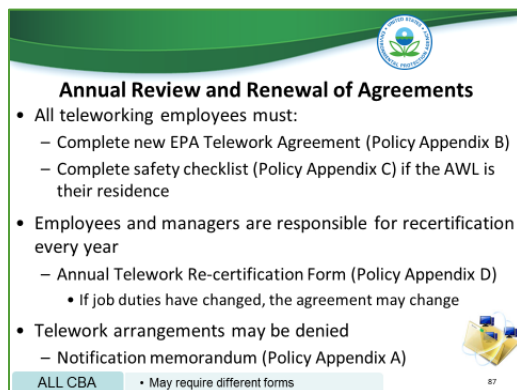
This documentation must be approved and signed by the DAA/DRA (or their designee). If the request is not approved, the DAA/DRA (or his/her designee) will respond in writing with the reasons the request was denied.

Now let's move to the process for review and renewal of the telework agreement.

>> NEXT SLIDE

**SHOW:** Slide 87

**TIME:** 2 minutes

**STATE:**

After consultation with their supervisor, all teleworking employees must:

- complete the new EPA Telework Agreement (Policy Appendix B)
- complete the safety checklist (Policy Appendix C) if the AWL is their residence

You should note that the bargaining units may have their own forms that must be filled out.

Employees and managers are responsible for recertification **every year** as required by the EPA Telework Policy at a time to be determined by each office, division or higher organizational unit. The form for recertification is the Annual Telework Re-certification Form (Policy Appendix D).

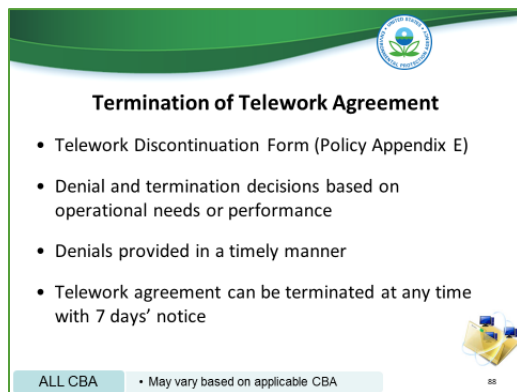
- if job duties change at any time, the telework agreement may change

Also, a supervisor or manager may deny a telework arrangement if the duties of the position are not amenable to telework. Supervisors and managers must use the notification memorandum (Policy Appendix A) to notify employees of their ineligibility, if applicable.

>> NEXT SLIDE

**SHOW:** Slide 88

**TIME:** 2 minutes



**STATE:**

If a teleworking agreement must be terminated, supervisors should use the Telework Discontinuation Form (Policy Appendix E).

Denial and termination decisions must be based on operational needs or performance in accordance with the description in the law, not personal reasons.

- If the employee's denial or termination was as a result of a performance issue, the denial or termination should include information about when the employee might reapply, and also if applicable, what actions the employee should take to improve his or her chance of approval.
- Denials should be provided in a timely manner.

A full-time telework agreement can be terminated at any time with 7 day (calendar) written notice.

- The employee will have 10 days (calendar) to report to the regular office/worksite. However, the ten calendar day range to relocate should be assessed on a case by basis. This range could also be offset with leave options, such as annual leave or LWOP, to provide some additional time.
- But, when employees agree to the conditions of full-time telework outside of the LCA, they also agree to relocating back to their regular office/worksite if their full-time telework is terminated.

Please note the process for termination may vary based on the applicable CBA.

>> NEXT SLIDE

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**SHOW:** Slide 89

**TIME:** 2 minutes



**STATE:**

Before we continue on to the Discussion Scenarios, do you have any questions on making the decision to allow someone to telework?

*Check for questions. If the questions are specific, try to redirect the attendees to asking more high level, general questions. The telework coordinator, their supervisor or HRO/RHRO/PMO may be able to answer specific questions later or reply via email if necessary.*

>> NEXT SLIDE

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## Activity 4: Discussion Scenarios (35 minutes)

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**SHOW:** Slide 90

**TIME:** minimal

**STATE:**

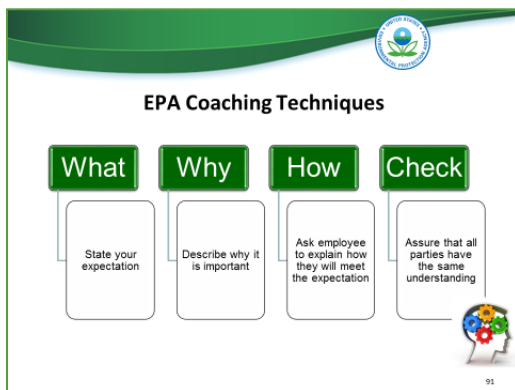
We will now complete an activity where you will address and provide solutions for scenarios that may occur with employees in regards to the new telework program. As part of this activity, we will also review the EPA coaching techniques that supervisors can use in their discussions with employees.

>> NEXT SLIDE

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SHOW: Slide 91

TIME: 5 minutes

**STATE:**

When having a discussion with your employee, you should use these four basic guiding questions. What, Why, How, and then Check. For example, when setting expectations with an employee, you would want to cover:

What...This is where you would state your expectation

Why...Why is it important?

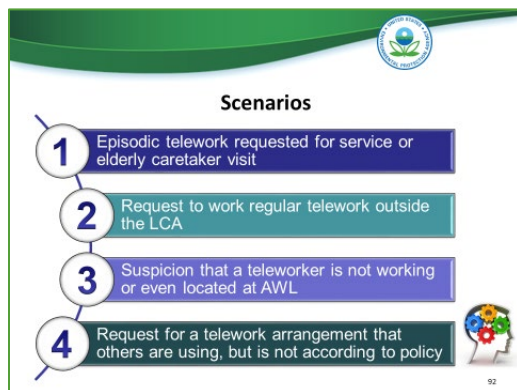
How... Ask the employee how they might meet the stated expectation

And then you should always Check...for understanding. Be sure that before you end the conversation, both parties know what has been decided.

>> NEXT SLIDE

SHOW: Slide 92

TIME: 30 minutes



STATE:

Okay, now we'll begin the scenario activity. For this activity you will be placed into small groups. Each group will receive a scenario that contains a situation and the relevant policy information for that scenario. You may use any information you have available to help you to solve the scenario. **Please take the time to discuss solutions in your small group, recording any relevant information in your learning journals on page 36.** After 10 minutes, we'll ask you to share the scenario and your group's solution with the entire class.

Split the class up into 4 small groups. Assign one scenario to each group. (If there are too many people for 4 groups, use more, however, the some groups will have the same scenarios)

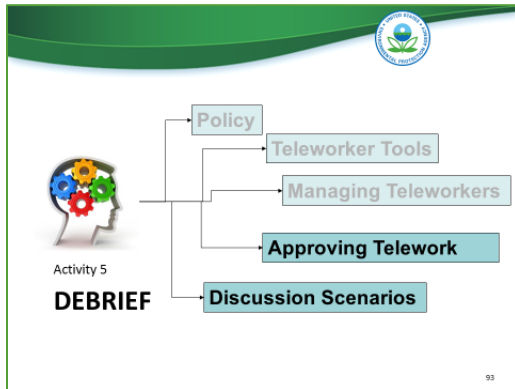
After 10 minutes, ask for one group to volunteer to share, and continue from group to group.

>> NEXT SLIDE

Activity 5: Debrief (10 minutes)

SHOW: Slide 93

TIME: 10 minutes



STATE:

Now we have 10 minutes set aside to catch up and debrief on the topics we've covered so far. Does anyone have any further questions about approving someone for telework or any of the discussion scenarios? Or any of the other topics we covered earlier?

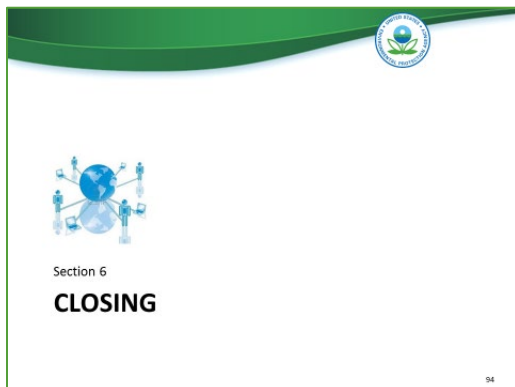
Answer any questions as necessary

>> NEXT SLIDE

Section 6: Closing (10 minutes)

SHOW: Slide 94

TIME: 1 minute



STATE:

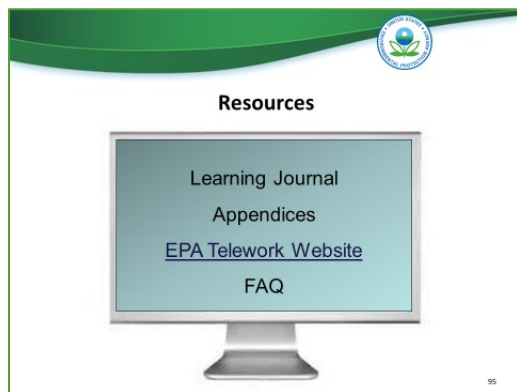
We are now at the close of our training session. Before you leave, please be sure you feel comfortable knowing where there are resources available to help you as the EPA implements the new telework policy.

>> NEXT SLIDE

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**SHOW:** Slide 95

**TIME:** 9 minutes

**STATE:**

In addition to your Learning Journal with the slides and activities you completed today, you also have the appendices in the back and you have the link to the new EPA Telework website. The FAQ will be provided to you after the training. Please remember, if you have other immediate questions about any telework topic, please contact your LER.

*When the website is available, take this time to show the participants the website. Click the text "EPA Telework Website". This is a link to the site.*



*<http://workplace.epa.gov/telework.html>*

Do you have any questions about any of these resources or how to find them?

*Answer any questions as necessary*

Thank you very much for your time. Enjoy the rest of your day.

### Instructions

## Activity 1 BENEFITS AND CHALLENGES OF TELEWORKING

9

Page 5

For Whom?  
(supervisor or  
employee)

## Benefit

## Challenge

## For Whom?

## Which Tool to Use?

Fill in the blanks below to list one or more tools you could use for each action.

Meet with one employee or my entire team

---

---

Enable my team to work on the same document

---

---

Provide checklists for work projects

---

---

Enable my team to communicate quickly during the workday

---

---

Provide training for my team to include video

---

---

Provide a way for my employees to use call forwarding

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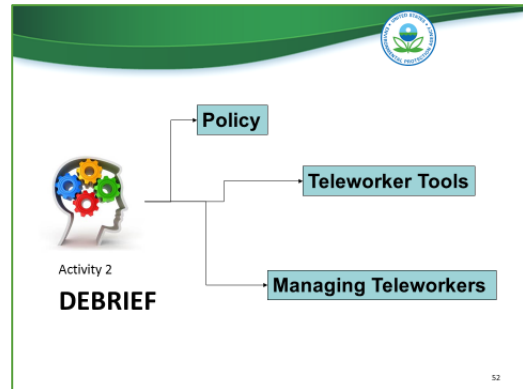
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## Activity 2: Debrief

### Instructions

List any questions or comments about either the policy, teleworker tools, or managing teleworkers in the space below

Learning  
Journal  
Page 26



## Activity 3: Convert Your Processes

### Instructions

Think of one or more management processes you use that does not currently address teleworkers. Then think of how you could make it “telework-enabled”. After you write one or more processes and “solutions”, you’ll pair up with one or 2 other people to discuss your ideas among yourselves, and then you will share your ideas with the entire class. You may use the ideas on the slides or any other information we have covered so far today, if they are relevant for your office.

Learning  
Journal  
Page 27

### My Processes

Example:

Weekly stand-up with team  
in conference room



Use Skype for Business instead for everyone, either everyone at their own desk or using conference room with call in from teleworkers.

## Activity 4: Discussion Scenarios

### Instructions

For this activity you will be placed into small groups. Each group will receive a scenario that contains a situation and the relevant policy information for that scenario. You may use any information you have available to help you to solve the scenario. Please take the time to discuss solutions in your small group, recording any relevant information below. After 10 minutes, we'll ask you to share the scenario and your group's solution with the entire class.

Learning  
Journal  
  
Page 36

### Notes for the Scenario

## Activity 5: Debrief

### Instructions

List any questions or comments about any covered topics in the space below.

Learning  
Journal  
  
Page 37

